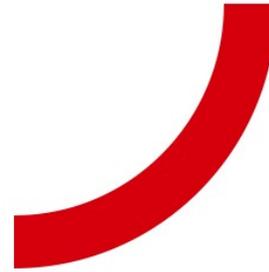




Tourist tribes on the coast: Segmentation by landscape experience



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SEMUR Symposium

28-29th October, 2019

Marine Institute

INTRODUCTION: Blue Growth, MSP and Coastal Change



RENEWABLE ENERGY

“Support the establishment of Ireland as a **world leader** of offshore renewable energy”
(NMPF 2019: p.119)



COASTAL & MARINE TOURISM

“Position Ireland as a **world class** sustainable coastal and marine tourism destination”
(NMPF 2019: p.68)



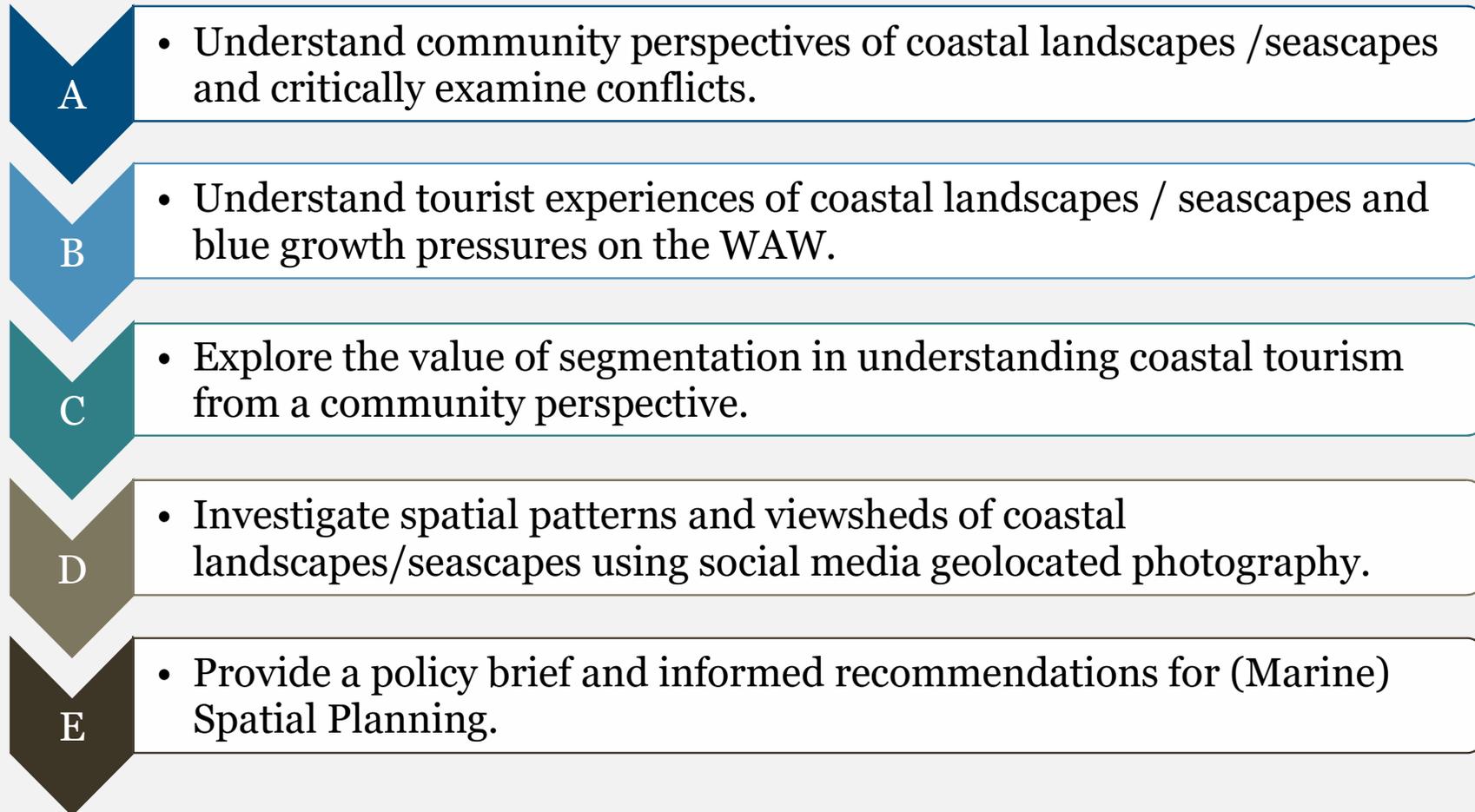
AQUACULTURE

“Support a diverse, compliant, **growing aquaculture** sector within Ireland”
(NMPF 2019: p.92)

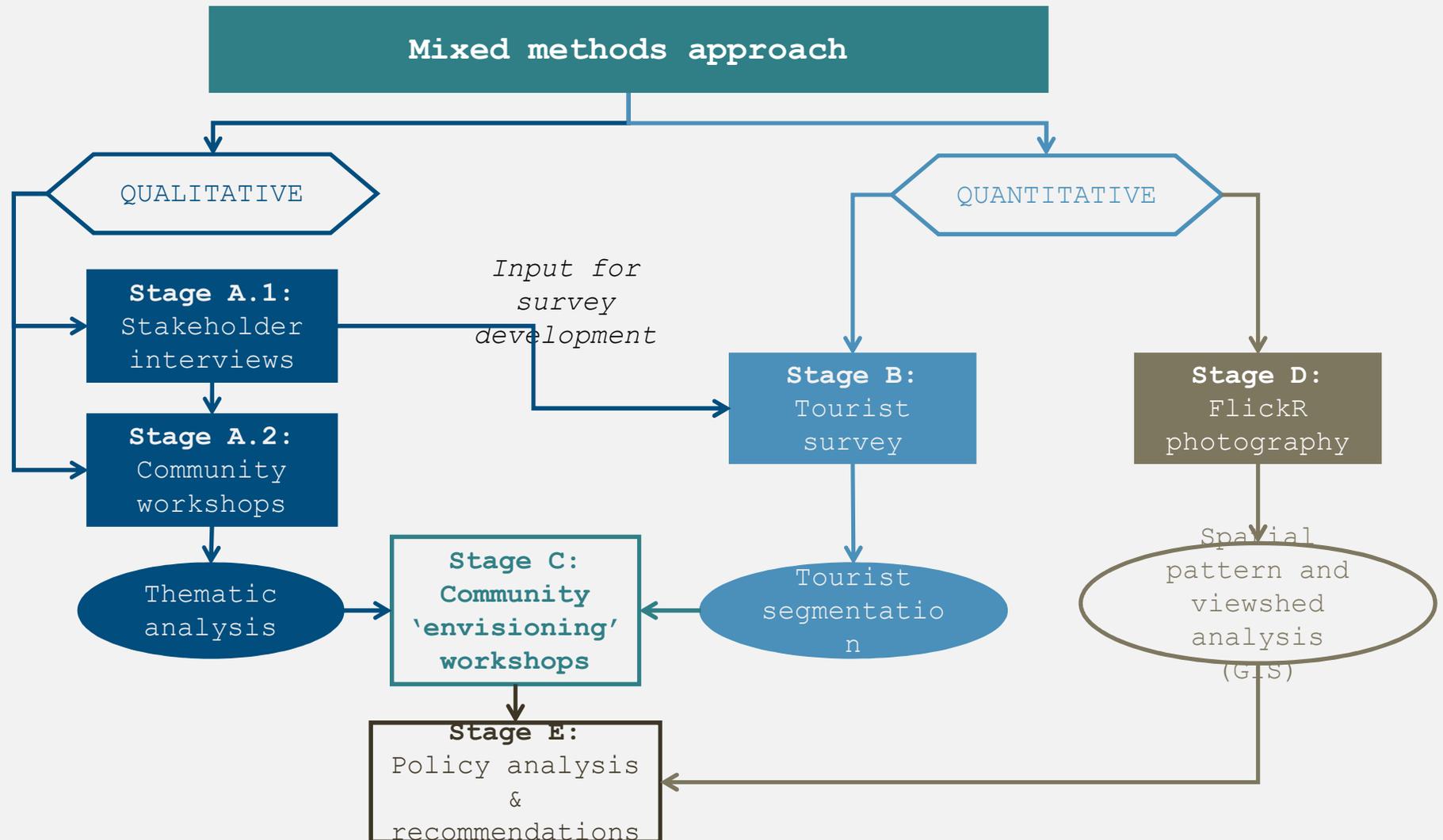
- Increasing BG brings fundamental changes on coastal and marine areas (Flannery et al. 2019)
- BG intensifies change on coastal landscapes/seascapes and heritage → Important assets of coastal tourism
- Coastal tourism a key sector of BG → A potential sector for community-led development (EC 2017)
- Need for a more nuanced understanding of landscape experience for sustainable planning solutions.

Project Objectives

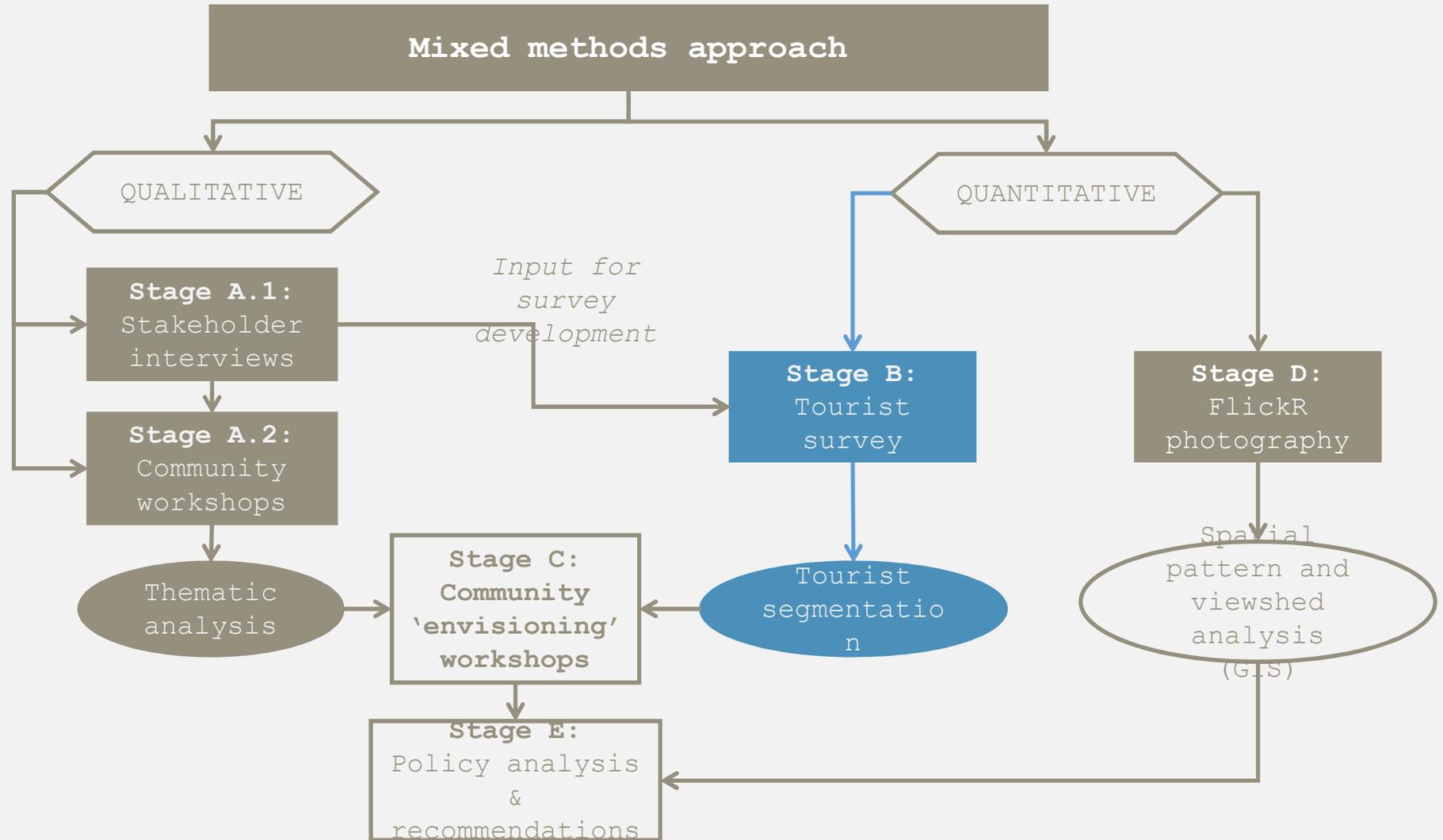
- **Research aim:** Investigate how local communities and tourists perceive coastal landscapes and changes driven by Blue Growth.



Methodology



Research design



NMPF & Tourism

Objectives

(NMPF 2019; page 168)

1. Position Ireland as a world class sustainable coastal and marine tourism destination.



2. Support **communities** in coastal areas through the increase in sustainable marine-based and coastal tourism activities.



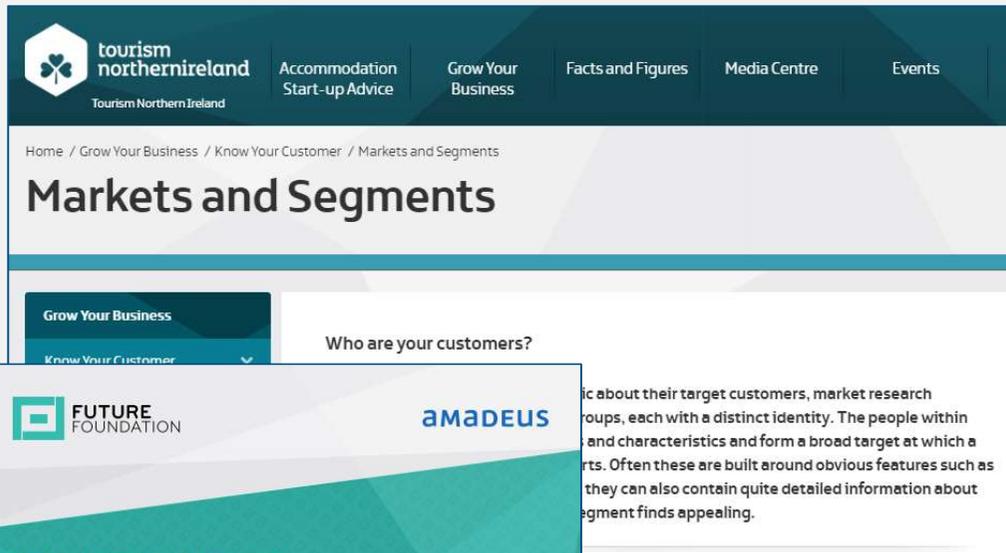
3. Maintenance of the natural marine and coastal areas which are a significant factor in bringing tourism and revenues to coastal **communities**.



Identify and develop the most promising tourist segments (p. 169)



Photos: Personal file



FUTURE TRAVELLER TRIBES 2030

UNDERSTANDING TOMORROW'S TRAVELLER



Tourist Segmentation

- ❑ Concurrent examination of multiple variables for the emergence of homogenous groups with common perspectives and behaviours
- ❑ Benefits:
 - Expand tourism market with emergence of **niche markets**
 - Identify **growth opportunities** for isolated areas
 - Identify **policy gaps** and **align objectives** with environmental goals in protected landscapes (Rid *et al.*, 2014)
- ❑ Segmentation primarily based on market criteria:
 - Expenditure, motivations, expected benefits
 - Demographics

BUT

Tourists often framed exclusively as 'buyers' with fixed tastes when it comes to landscape

Our Approach

- ❑ Tourists are far more critical consumers with complex and multi-layered experiences of the coastal landscape
- ❑ Tourists and locals share more common perspectives about landscape and pressures than is sometimes supposed

- ❑ How can segmentation be used to:
 - A) Capture this complexity of landscape experiences at the coast and provide planning solutions to sustainably manage such experiences?

 - B) Mobilise community-led initiatives for coastal tourism?

“The tourist experience is not given in advance. Instead, it is shaped during interactions with the landscape and the locals”
(Bruner, 2005)

Tourist Survey Objectives

A

- Elicit tourist segments on the WAW based on landscape experience

B

- Understand how tourists perceive landscape pressures and discuss planning solutions

C

- Explore the value of segmentation in understanding coastal tourism from a community perspective

The Survey Design

Motivation, visit frequency and the WAW

QUEEN'S UNIVERSITY BELFAST

CLIP

Tourist survey

CLIP - Coastal Landscapes and Inclusive Planning is a PhD research project investigating the perceptions and attitudes about the landscapes of the west coast of Ireland. The research is funded by the Marine Institute, a State agency responsible for marine research, technology development and innovation in Ireland. Your responses will help us understand what you value in these coastal landscapes and what you consider to be the changes that threaten their future.

This study has received ethical approval from Queen's University Belfast. Your participation is voluntary and you can withdraw from completing this questionnaire at any time. Your responses are anonymous and treated in the strictest confidence. We really appreciate your help and if you have any queries please contact me, Maria Páil, on mpail@qub.ac.uk. Please tick if you agree to take part in this survey.

How often do you visit the west coast of Ireland? Tick one box I live here More than once a month Once every few years First time

What is the main reason why you are here today? Tick one box I live here On holiday On business Visiting friends and relatives Other

How did you find out about the Wild Atlantic Way? Tick all boxes that apply Internet websites Social media Flyers TV Radio Friends Other Don't know

How important was the Wild Atlantic Way in your decision to visit? Tick one box A lot A little None at all Don't know

I agree to take part in this survey

Strongly agree Mostly agree Neither Mostly disagree Strongly disagree

range of statements and would like you to say to what extent you agree or disagree tick one box

the ocean makes me feel

about the environment

place because of its

istic opportunities this

more about the fish and heritage

ic and wild scenery

coastal communities of pace

ually special to me

ical food and the local id here

the Irish identity landscape

me a sense of freedom

and tranquil.

I feel somehow attached to this place

I am not especially interested in landscape preservation

Landscapes should be changed to support human needs, even if this means losing some historical features

Strongly agree Mostly agree Neither Mostly disagree Don't know

Do you own your home? Own my home Rented from someone else Other

is your gender? Male Female Other

Thank you for participating in this survey

QUEEN'S UNIVERSITY BELFAST

CLIP

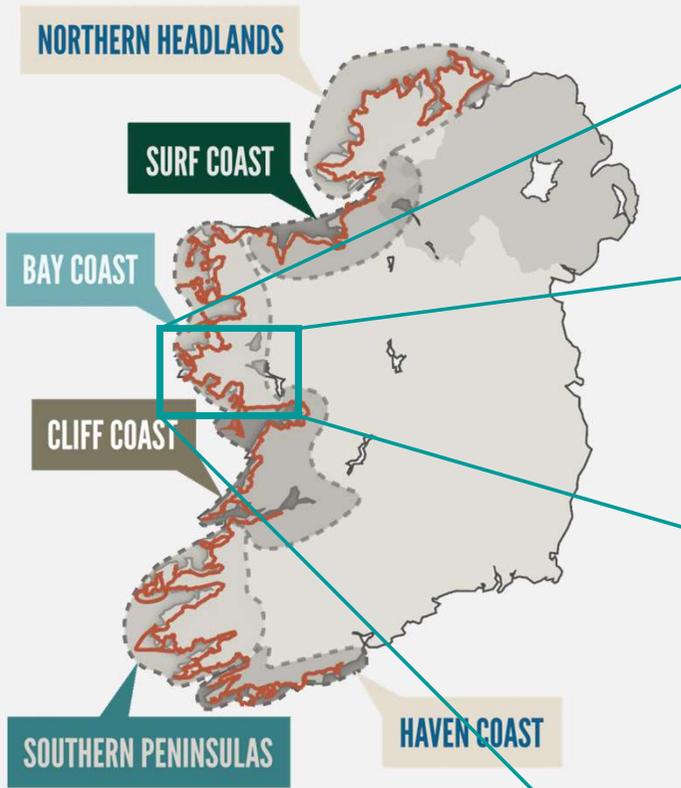
Likert-type scale

Landscape values and perceptions (Segmentation variables)

Socio-economic variables

DATA COLLECTION

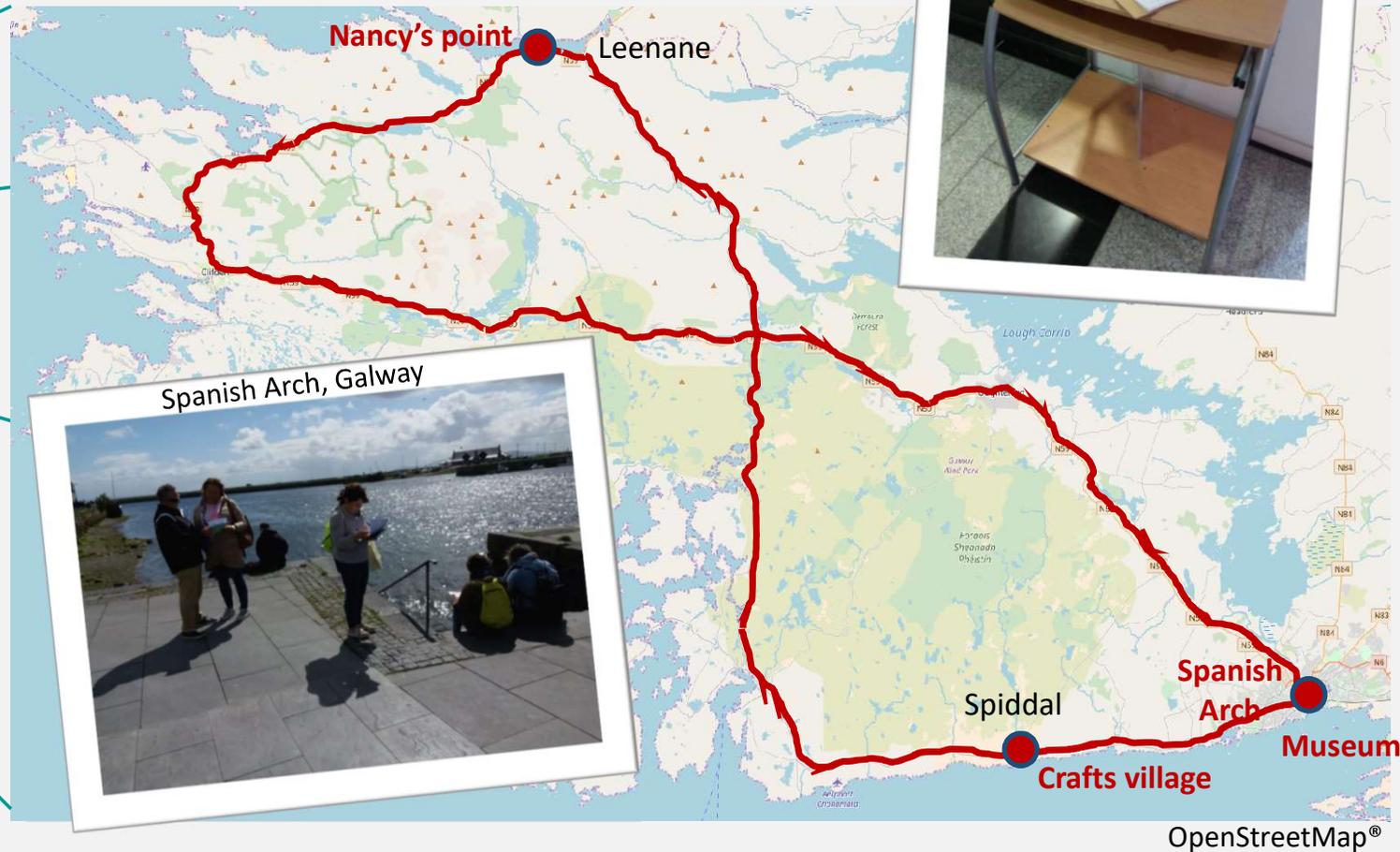
The Wild Atlantic Way



Source: Fáilte Ireland, 2015

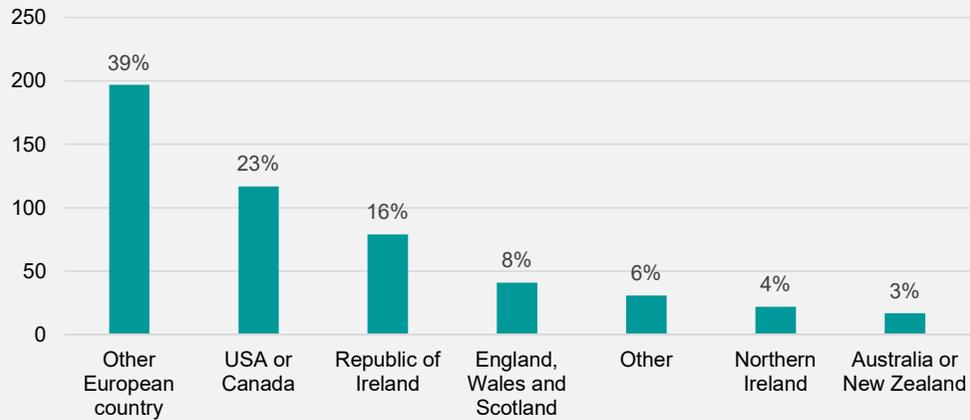
● Data collection (Summer 2018)

- Self – administered questionnaires
- 3 locations and 1 route (onboard Connemara bus tours)
- 504 respondents (of which 404 overseas tourists)

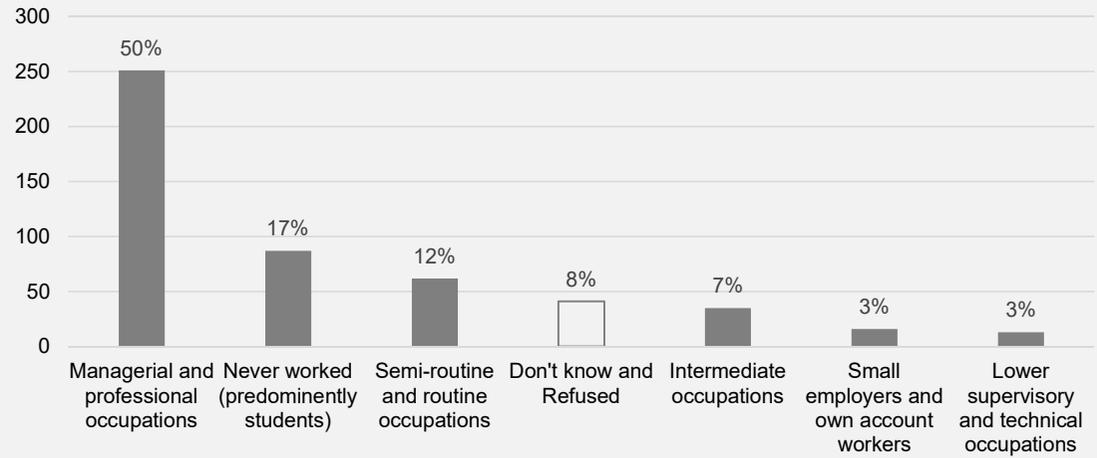


The Sample

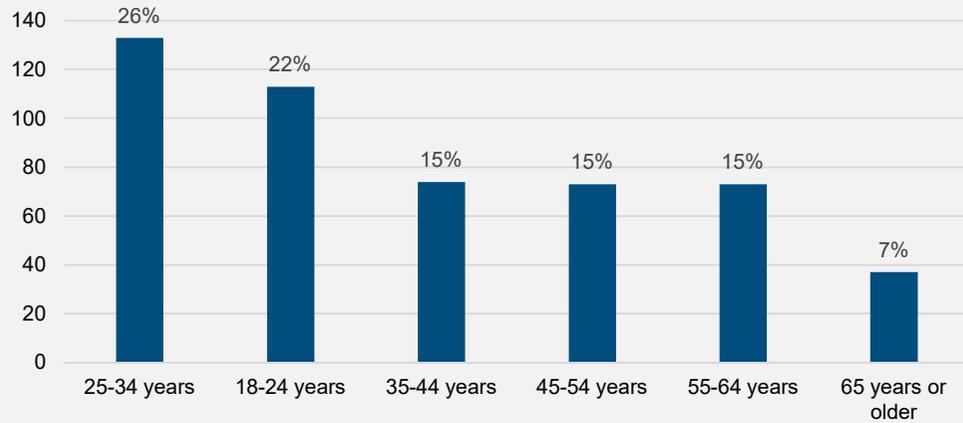
Country of residence



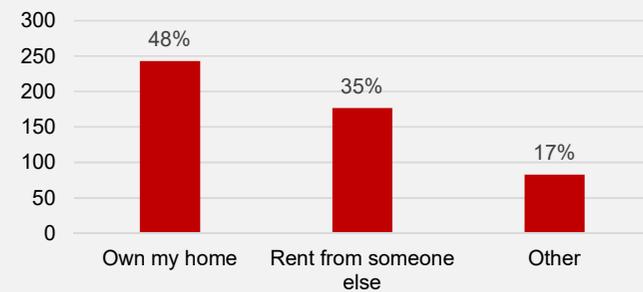
Job



Age

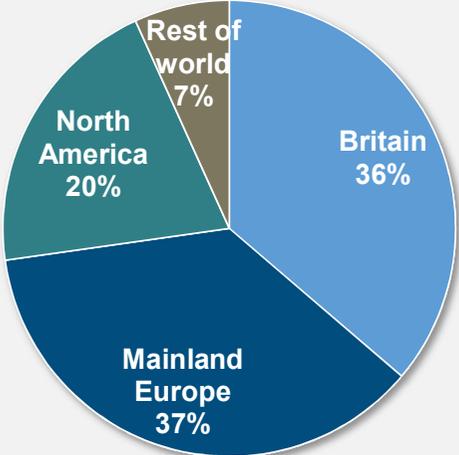


Home ownership

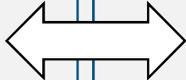
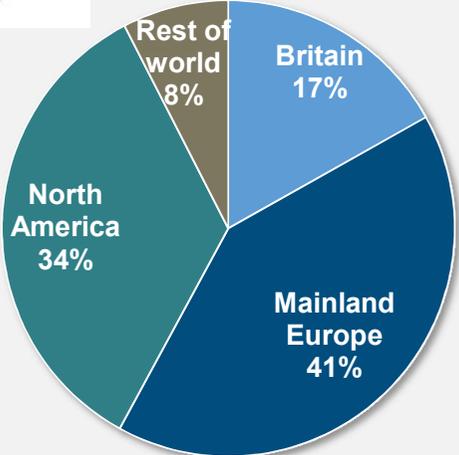


Overseas Tourists by Country of Residence: Fáilte Ireland stats vs. Sample

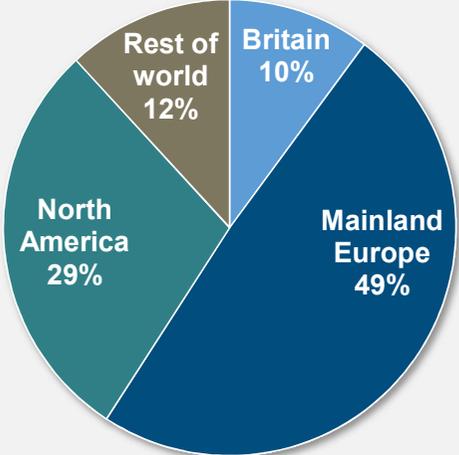
**Whole Country
Aggregates
2018**



**West Region
Aggregates
2018**



**Sample
2018**



*Error rate on (p) 20% : -/+ 3.9%

*Estimated for 95% confidence interval

Source: Fáilte Ireland (2019) "TOURISM FACTS 2018 Preliminary". Available at:
<http://www.failteireland.ie/FailteIreland/media/WebsiteStructure/Documents/Publications/Preliminary-Tourism-Facts-2018.pdf?ext=.pdf>

Tourist Segmentation by Landscape Experience

- ❑ PCA was used on 17 items to elicit the segments
- ❑ Findings suggest that tourist perspectives are best represented by six segments which cumulatively explain **63% of the variance** within the data.

Blue Health Seekers (15%)

- **Restorative value** of blue environment important
- The sea/coast as a way to experience **calmness, tranquillity, peace**
- **Intrinsic and emotional experiences**
- Irish and European young professionals

Preservation Travellers (10%)

- **Sense of community** important
- Identify signs of **pressures from blue growth** and **extensive urbanisation**
- Perceived **loss of landscape identity**
- **Concerns** for environmental sustainability

Responsible Visitors (12%)

- **Critical** of tourism industry
- **Conscious** of their own impact on the coast
- **Concerns** for over-development and exploitation
- Travelling to **visit friends/family** OR **connect with 'roots'**
- Mainly Irish and North Americans

Heritage Explorers (8%)

- Interested in exploring **landscapes, history, tasting local food** and meeting **locals**
- Mainly young Europeans and older North Americans
- "Culturally Curious" (Fáilte Ireland, 2015)

Nature Escapers (11%)

- Attracted by **blue/green environment** and **outdoor recreational** opportunities
- Engage in **physical activity**
- Tend to be younger than other segments
- "Great Escapers" (Fáilte Ireland, 2015)

Environmental Vacationers (7%)

- Attracted by **scenic views** and **wilderness**
- **Critical** of blue growth and landscape pressures (esp. aquaculture, tourism etc.)
- **BUT sympathetic to wind energy**

Source: Pafi, Flannery and Murtagh 2019 (under submission)

How do tourist segments resonate at the community level?

SIMILAR PERSPECTIVE TO: *Blue Health Seekers*

Quote from community workshop:

*“That’s just my favourite place in the world. It’s just a sense of, it’s **a sense of space** but it’s also **a sense of security**. I feel like I’m closed in on the bay but I’ve got all this space within it, yeah. No, definitely **my favourite place to go if I’m happy or sad or whatever, it’s the pier.**”*

Participant #4, Spiddal



How do tourist segments resonate at the community level?

SIMILAR PERSPECTIVE TO: *Blue Health Seekers*

Quote from personal interview:

“I took this [photo] to show you the place I was going to when I was feeling very sick and I was doing a lot of walking to recover. So, I would walk on like a kind of a loop at the beach and back to my house [...]and I wanted to show you this place ...”

Participant #5, Spiddal



Conclusions and Next Steps

- We argued that tourist market segmentation has narrowly focused on socio-economic aspects failing to account for tourists' landscape experiences.
- Increasing pressures from BG and mass tourism are being perceived and increasingly questioned by visitors (and communities)
- There is a potential negative relationship between increasing BG and tourism on the WAW → Need to further investigate how the NMPF responds to this.
- Responses of Blue Health Seekers, Responsible visitors and Preservation travellers are very common to those expressed by local communities → Gap in policy about **blue health**
- Recognising these alternative market segments opens opportunities for inclusive forms of local development and landscape management.

Further research:

- **Community “envisioning” workshops** are currently being organised to investigate how communities can develop a **blue health** agenda and create **new forms of distribution from blue growth** and sustainable use of local landscapes, assets and values.

Thank You

Any questions?

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🐦 [@Maria_Pafi](https://twitter.com/Maria_Pafi)

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